

2014

# AuthorityOnline User Registration



30 South Meridian Street, Suite 1000

Indianapolis, Indiana 46204

317.232.7777(p) 317.232.7778(f)

Main site: [www.ihcda.in.gov](http://www.ihcda.in.gov)

Partner site: [www.ihcda.in.gov/myihcda](http://www.ihcda.in.gov/myihcda)

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## Section 1: Introduction

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### 1.1 Purpose

This guide has been developed as a reference tool to aid in the creation and registration of user accounts and access for various IHCD programs within IHCDOnline.

Requests for access in IHCDOnline will be reviewed by an Organization Administrator. For more information on how the Organization Administrator function works, please refer to the *Online User Management and Maintenance* training available at: <https://ihcdonline.com/AuthorityOnline/Links.htm>.

In addition to this guide, other training resources related to claims and other IHCDOnline functionality are available at: <https://ihcdonline.com/AuthorityOnline/Links.htm>

### 1.2 Applicability

The use of the Organization Administrator functionality to review registration requests is applicable to any organization that uses IHCDOnline. The noted exception is that requests for access under the Annual Owner Certification will need to obtain approval from the property manager for access to that specific property.

### 1.3 Disclaimer

The publication of this manual is for convenience only. Your use or reliance upon it herein does not, expressly or impliedly, directly or indirectly, suggest, represent, or warrant that your organization will be in compliance with the requirements of any applicable federal, state or IHCD regulations, policies and guidance beyond functionalities included in this document. IHCD and contributing authors hereby disclaim any and all responsibility of liability, which may be asserted or claimed arising from reliance upon or utilization of this manual.

Additionally, please note that all screenshots provided in this guide as a visual reference are from IHCD's test data and do not reflect actual awards, agreements or contracts.

## Section 2: User Registration and Review

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This section outlines the basic process in registering for a login and password in IHCDOnline as well as provides basic information on the review process.

### 2.1 Registration

- 1.) Go to [www.ihcdonline.com](http://www.ihcdonline.com)
- 2.) Select "AuthorityOnline"

## Welcome to Indiana Housing and Community services.

This site allows our partners to access resources for managing their awards.

Authority Online

The Authority Online site is used for user management and reporting.

ClientTrack

ClientTrack is used for managing awards.

Weatherization

The Weatherization Assistance Program is used for managing awards.

3.) Click on “[New User? Register Here](#)” link on the page.

### Welcome to the Authority DMS Online Management System

This site will allow organizations working with the Indiana Housing and Community Development Authority to manage information about their awards. Some of the features of this site are claims management, Owner Certifications, IDA Awards, NAP Reporting, and the Single Family software download. This site continues to be expanded for to allow our partners to work more closely with us and to streamline our processes.

Username:

Password:

[New User? Register Here.](#)

Login

[Forgot Your Password?](#)

[Online Resources and Training Videos](#)

Click [Here](#) to visit the IHEDA website.

4.) Enter the Profile Information, including First Name and Last Name. Then enter your business email address and create a password. Passwords must be at least 7 characters and contain at least one number.

### Registration

In order to gain access to this website, you must request it and have it approved by the S

If your organization is already registered, please enter your organization code which you can find on your organization or the HFA. This code will ensure that your registration can be processed more quickly.

#### Profile Information

First Name:

Last Name:

E-mail:

NOTE: It is recommended that new users use their business email address.

Username:

Password:

Confirm Password:

If your organization is already registered, please enter your organization code which you can find on your organization or the HFA. This code will ensure that your registration can be processed more quickly.

Enter Organization Code:

My Organization is not registered

#### Organization

Name:

Address:

City:

State:

Zip Code:

Telephone:

Fax (optional):

- 5.) If your organization is already registered, please enter your organization code which you can obtain from another user at your organization or by the Organization Administrator. If you are unsure who the Organization Administrator is for your organization, please contact [claims@ihcda.in.gov](mailto:claims@ihcda.in.gov) for further assistance.
- 6.) Once you have entered your code, please press the “Load” button. This will populate the information in the “Organization” area based upon the Organization Code entered. Please verify the information is correct

The screenshot shows the 'Registration' page of the IHCDA Online system. The page title is 'Registration'. Below the title, there is a note: 'In order to gain access to this website, you must request it and have it approved by the State. Please enter the following information:'. A sub-note states: 'If your organization is already registered, please enter your organization code which you can obtain from another user at your organization or the HFA. This code will ensure that your registration can be processed more quickly.' The form is divided into two main sections: 'Profile Information' and 'Organization'. The 'Profile Information' section includes fields for 'First Name', 'Last Name', 'E-mail', 'Username', 'Password', and 'Confirm Password'. The 'Organization' section includes fields for 'Name', 'Address', 'City', 'State', 'Zip Code', 'Telephone', and 'Fax (optional)'. A red box highlights the 'Enter Organization Code' field and the 'Load' button. Below the 'Enter Organization Code' field, there is a checkbox labeled 'My Organization is not registered'.

- 7.) If your organization has never used IHCDAOnline before and is, therefore, not registered, please select the “My Organization is not registered” box.

This screenshot is identical to the one above, showing the 'Registration' page. However, the red box now highlights the 'My Organization is not registered' checkbox, which is located below the 'Enter Organization Code' field. The 'Load' button remains visible to the right of the checkbox.

- 8.) Enter your organization’s information in the Organization Box on the right side of the screen. This will also cause the Organization to be registered for future use.

- 9.) Select the Access Type needed by the user as described in Section 3 of this document. Your Organization Administrator will review the requested access type and determine which specific permissions best fit the user needs.
- 10.) Once you have made the appropriate selections, hit the “Next” button.

Fax: (optional)

**Access Types**  
Please check the box next to the type of access you are requesting. You should only request access to the program(s) that you are directly involved in. If you request access for a program that you are not involved with, you may find that your request will be denied for all programs.

☐ Annual Owner Certification and 8609 Access for Rental Housing  
☐ Neighborhood Assistance Program Access for Community Development  
☐ Individual Development Account Access  
☐ Claim Management Access  
☐ HCV Access  
☐ Third Party Claims Access  
☐ Manage your organizations information and users

- 11.) Review the Registration Summary screen. Please verify all information on this screen is correct. Please note that if you cancel at this point, all information will be removed from the Registration Screen. If it is all correct, click the Submit button.
- 12.) You will then receive a message at the bottom of the screen **“Your registration information has been submitted and is being processed. An email notification will be sent to you upon approval or denial. Please be aware that your request may take up to 3 business days to be processed.”** Click Return to exit this page.

## 2.2 Request Reviews:

Reviews are processed by the Organization Administrator role for that organization. They will receive an email and they can approve that request in Authority Online. Once the request is reviewed, the individual will be sent an email stating whether they were approved or denied the requested access.

The *Online User Management and Maintenance* training available at: <https://ihcdaonline.com/AuthorityOnline/Links.htm> contains more detailed information on how the request review and approval process works.

If you do not know who your Organization Administrator is, please contact [claims@ihcda.in.gov](mailto:claims@ihcda.in.gov) for assistance.

## Section 3: Access Types

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This section provides definitions of the access type groups and individual permissions available in IHCDOnline. During registration or subsequent access requests, users will request access via the access type groups defined below. The Organization Administrator will review the access requests and grant the individual permissions as appropriate.

### 3.1 Annual Owner Certification and 8609 Access for Rental Housing

Users with this security level will have access to the LIHTC owner/tenant certification or the progress reporting for specific properties. If a user requests this access as a property owner, the Property Owner will need to approve their request. If a user requests this access type as a property manager, the property owner will grant the users request to that property.

If the “**Annual Owner Certification and 8609 Access for Rental Housing**” access is requested, it will require the user to enter the Property BIN Number(s). At least one BIN needs to be entered. Select the Access type of Owner, Property Manager or Other and Click the Add button. If you need to enter another BIN Number, do so now, or click Next to proceed.

**Owner Certification Access**

**Property BIN Numbers**  
Add the BIN numbers for the properties you would like access to. Indicate whether or not you are the owner by checking the box before clicking "Add"

Award or BIN Number  
Example: IN-99-99999

Access Type

☐ Owner ☒ Property Manager ☐ Other

Add

Cancel Next

### 3.2 Neighborhood Assistance Program Access for Community Development

Users with this security level will have access to the NAP reporting and the NAP application.

#### **NAP Viewer**

This permission allows a user to view the completed NAP application but it will not allow them to edit or create applications or reports.

#### **NAP Editor**

This permission allows the user to create and submit NAP applications and reporting functionality.

### 3.3 Claims Management Access

Users with this security level have the ability to review or submit funding requests, perform repayments, and view budgets for awards or grants associated with their organization or awards where their organization is the claim consultant.

#### *Claim Viewer*

This permission allows an individual to view an existing claim but does not allow for any edits to be made or allow them to submit the claim.

#### *Claim Editor*

This permission allows an individual to create a new claim, access an existing claim, enter/update/modify information within that claim, and save the claim. It does not, however, allow the individual to submit the claim for review to IHCD.

#### *Claim Submitter*

This permission allows an individual to submit a completed claim to IHCD for review. This permission does not allow for the generation of a claim, the completion of the various fields. It is a review level permission. Any individual who submits this claim is verifying that they have reviewed the claim and that the expenses and related documentation are eligible and accurate under federal regulations and IHCD policy.

**It is strongly recommend that this particular permission be restricted to only a few individuals at the organization to ensure that claims are reviewed and submitted by individuals with proper authority at the organization level.**

### 3.4 HCV Access

Users with this security level will have access to the Housing Choice Voucher quality control reporting tool.

#### *HCV Report Editor*

This permission gives the individual access to the Housing Choice Voucher quality control tool and will allow them to access and utilize the tool.

### 3.5 Third Party Claims Access

Users with this security level have the ability to view claim summaries for claims that have been submitted by another organization that are to be paid to their organization (third party payment).

#### *IHCDOnline-Third Party Claims*

This permission will allow grantees to view claims that have been submitted on their half by another organization.

### 3.6 Manage Your Organization's Information and Users

Users with this security level have the ability to edit information about their organization including contacts, partners, partnerships, organization roles, and users. This access allows the user to manage requests from other users in their organization and revoke user's permissions for their organization.



If the “**Manage your Organization Information**” access is requested, it will require the user to select an Organization Role(s) from the drop down listing of options, then click the Add Button.

Manage your Organization Information

Organization Roles

Choose a Role

Choose a Role

Accountant

Administrator

Applicant

Architect

Attorney

Bond Counsel

Bond Enhancer

Bond Issuer

Bond Underwriter

Claim Consultant

Construction Contractor

Consultant

Contractor

Developer

Engineer

Environmental Firm

FSA Consultant

Grantee

Management

On Site Manager

Owner

Physical Needs Firm

Sub-Recipient

Surveyor

Title Company

Add

### **Organization Administrator**

This individual will be granted access to certain areas of IHCDOnline that are otherwise inaccessible. Most notably these areas include the Online Bank Information and the ability to manage user profiles for users at your organization.

## **3.7 Online Application Access for Developers Only**

Users within this permission group have access to various applications submitted for funding via IHCDOnline. This permission group is controlled by the Organization Administrator.

### **Online Application Viewer**

This permission allows the individual to view the various applications submitted (or in process) for funding via IHCDOnline. However, the individual does not have the ability to start, complete, edit, or submit an application for funding consideration.

### **Online Application Editor**

This permission allows the individual to view the various applications submitted (or in process) for funding via IHCDOnline. This individual has the ability to start, complete, edit and submit an application for funding consideration.

## **3.8 Organization View**

This security group is automatically granted to anyone who is granted any of the other access types and is related to the user's organization. Users do not request this permission from Authority Online but it is visible in the user management. The purpose of this access type is to allow a user who has been removed from their other security groups to be able to login to Authority Online and request new access types. This access type can be removed by an organization administrator.

## **3.9 Individual Development Account Access**

Individual Development Account Administrators can manage their participants and programs.